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Social Security Experience Panels: Annual Report 2018



EQUALITY, POVERTY AND SOCIAL SECURITY



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Foreword

It is my pleasure to publish the Scottish Government's first annual report on the work of the Social Security Experience Panels.

From the very outset of this Government's work on social security, we have been committed to co-designing the new system in partnership with the people of Scotland through the creation of Experience Panels. Our motivation was simple: if we want to create a system that helps and supports people, then who better to ask than those who know social security best – the people who have lived experience of it.

The story that is told on these pages is one of collaboration and innovation. It demonstrates the power of going further than consultation to treat the people of Scotland as active partners in designing services that meet their needs. Put simply, there are first rate ideas and solutions now being put in practice as a direct result of Experience Panel input.

Like anything new and innovative, there are lessons to be learned from our work this past year. We are committed to learning and improving as we go forward, and to apply lessons from this approach across the Scottish Government.

The members of the Experience Panels should be enormously proud of what they have achieved in the last year. I thank each and every one of them for their time, their creativity and their commitment to build a better system for their fellow citizens. I hope it is equally clear to them that the Scottish Government is genuinely listening and that together we are achieving something important and valuable.

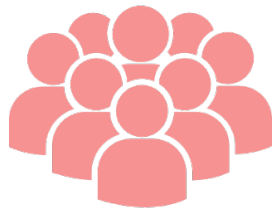
The work of the Experience Panels is far from over, there is lots more for us to do together in 2019 and beyond. We will continue to listen and apply the lessons from panel members across the design of social security in Scotland.



Shirley-Anne Somerville, Cabinet Secretary for Social Security and Older People

Experience Panels 2018 in Numbers

2,400+
Panel
Members



21
surveys

with **3,450 +** responses

45

focus
groups

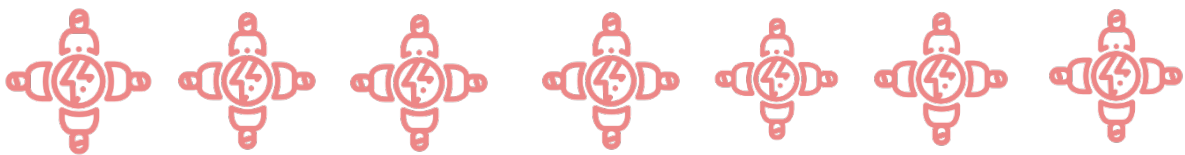


with over **150** people



over **65**
interviews

7 co-design sessions with a group of **34** people



22
Reports
and visual
summaries



1
pilot panel
member
newsletter

Introduction

The Scottish Government is becoming responsible for some of the benefits previously delivered by the Department for Work and Pensions (DWP). As part of the work to prepare for this change, in Summer 2017 the Scottish Government set up the Social Security Experience Panels.

The Experience Panels are made up of over 2,400 people who have experience of at least one of the benefits that are being devolved to Scotland. The Scottish Government works with panel members to inform key decisions in the design of social security in Scotland. This is the first annual report for the Experience Panels programme of research. It aims to feed back to panel members and others interested in the work about what has been achieved this year and what is planned for 2019.

2018 has been the first full year of the Experience Panels work. In 2017 our focus was on launching the Experience Panels, recruiting panel members and undertaking our first research with all panel members 'About Your Benefits and You'¹. In 2018, with the panels fully up and running, we have worked with panel members across Scotland on a wide range of topics. We have also found out more about our panel members, and shared what panel members have told us both with panel members themselves and others interested in our work.

Already we are seeing the influence of what panel members have told us on how social security will be delivered by the new agency, Social Security Scotland. This annual report will summarise what we have done and found this year and the impact it has had, as well as outlining our plans for next year.

¹ Scottish Government (2017) Social Security Experience Panels: About Your Benefits and you Quantitative Findings <https://www.gov.scot/publications/social-security-experience-panels-benefits-quantitative-research-findings/>

Scottish Government (2018) Social security experience panels - About Your Benefits and You: qualitative research findings <https://www.gov.scot/publications/social-security-experience-panels-benefits-qualitative-research-findings/>

2018: The Research

We have now conducted a large number of research projects with panel members. Our work has covered both the design of individual benefits, and topics related to how Social Security Scotland will work more generally. Findings are fed in to decision making, shaping decisions as they are made.

We report on our findings through full research reports and shorter, visual summaries which are designed to be as accessible as possible. These are sent to panel members as soon as they are published so they can see what they have said and how we have used the findings.

In 2018 we have published 22 reports and visual summaries, including on:

- About Your Benefits and You qualitative findings
- Personal Independence Payment Discovery
- Best Start Grant
- Designing the Social Security Charter
- Who is in the panels and their experiences so far
- Agency Opening Hours
- Young Carers Grant
- Automatic Entitlement & Award Duration
- Branding and Wording
- Universal Credit Scottish Choices
- Website Use
- Complaints, Re-determinations and Appeals

All reports can be found on our website at

<https://www.gov.scot/publications/social-security-experience-panels-index-of-publications/>.

While the topics listed above cover a range of different aspects of how social security will be delivered in Scotland, there are some

themes that we see coming up across our work with panel members.

Simple, Clear and Timely Processes

This theme was clear in ‘About You’ but has been echoed across our work with panel members. Panel members called for clear, straightforward information about benefits. And they asked for application forms that are as short as possible, which use plain English to ask clear questions.

“I was quite overwhelmed with the number of questions they were asking and how the questions were worded.”

Panel member,
Personal Independence Payment Discovery report

Flexible Approaches

Another key theme throughout individual projects is the importance of flexibility to meet the different needs of people interacting with Social Security Scotland. For example, having a choice between a paper form, an online form or applying in person at an office allows people to choose a way to apply that suits them best.

“I think every way of communication should be available to meet the demands of the client base.”

Panel member,
Agency Opening Hours report

Friendly, Helpful and Knowledgeable Staff

The importance of staff behaviour is also something we often hear from panel members. Part of this is about staff treating people as individuals, understanding the issues people face, and being polite and respectful when talking to people. Also important is staff having relevant knowledge about clients, about the social

security system, and the wider support available, and using that knowledge to help people however they can.

“The assessor who came to assess my son for his PIP understood his condition and helped him through the assessment by her attitude - she stood out amongst everyone else I have had to deal with.”

Panel member,
About Your Benefits and You qualitative report

Accessible and Inclusive

The importance of accessibility and inclusivity shines through both in our research with panel members and in our experience of working with panel members over the year.

This is important both in a practical sense, in that panel members ask and expect accessibility to disabled people as well as to those who speak other languages. For example, the need to use physically accessible buildings. But it is also important in terms of being inclusive in a broader sense. We saw this in the branding work where there was an expectation that photos used by Social Security Scotland would show the diversity of the Scottish population and of social security clients in particular.

“The accessibility of the panels is very good, provision of information is good and it is easy to contact people if help is needed.”

Panel member
‘Who is in the panels’ report

Impact of our work

Our work has been shaping decisions and materials such as application forms across the development of social security in Scotland. This impact has been reflected where we can in the 'we did' sections of our reports.

For example, the move from a three month to a six month time period for applying for Best Start Grant came directly from people telling us that three months was not long enough. Similarly, decisions around Social Security Scotland's name, the colours, photos, icons and words they used have been shaped by panel member's input. These are just two examples, as is the development of the Charter, which is described on the next page.

The work of Experience Panels has also contributed to a broad appreciation of the views and needs of people with lived experience across those working on social security. Colleagues who support our individual events have an opportunity to hear directly from panel members. We also make sure that what panel members tell us is shared not just with the people making the decision in question, but across all people working on social security.

"The Experience Panels enabled us to engage with hundreds of people about the current system to find out how it works and how it feels for people using it. This level of access has been invaluable throughout discovery phases for both Personal Independence Payment (PIP) and Disability Living Allowance (DLA) to help us identify what individuals need in order to ensure a system that embeds dignity and respect throughout.

Listening to people's stories has been so powerful in helping us shape the new disability benefits service in Scotland and we look forward to continuing to work with the experience panels on our on-going development."

Service Manager, Social Security Directorate

Spotlight On: The Charter

One of our biggest projects this year was the co-design of the charter for Social Security Scotland.

A charter is a document that sets out people's rights and how people should behave. It was set out in law that the Social Security Scotland Charter should be developed with people who have experience of social security.

We invited Experience Panels members to take part in this work and 34 people (including one non panel member from an otherwise unrepresented group) worked with us and our policy colleagues across a series of seven workshops to decide what was put in the charter.

We also gathered in-depth information from another 26 people in focus groups and interviews. Finally, we asked all Experience Panel members to take part in a survey to make sure they had their say on the charter.

The charter is set out in four sections which reflect what was important to people with experience of social security. These are:

1. A People's Service
2. Processes that Work
3. Learning and Improving
4. A Better Future

The people who worked on the charter were asked about their experience and all those who replied said that they felt fully supported, and the vast majority said they fully gave their opinions and that their opinions are reflected in the charter. One member said: I felt that the staff...

“..listened and genuinely valued my opinions”

We continue to involve colleagues in the design, conduct and reporting of the Experience Panels research to ensure that the panel member voices are embedded in the fabric of the policy and design process.

2018: How we worked

This section of the report will look at how we worked in 2018.

Finding out about panel members

In 2018 we found out more about panel members, using a survey to add to information from when panel members registered. From that information, we know that:

- Over 80% of panel members have one or more **disabilities** or long term health conditions
- Half have **caring responsibilities** (for disabled adults/children or someone in old age)
- As is common in research of this kind, there are slightly more **women** than **men**, and there are more people from older age groups than younger.
- 2% say they are from **ethnic minorities**
- 9% say they are **lesbian, gay or bisexual**
- Fewer than 10 respondents identified as **transgender**.

We have been running work alongside the main Experience Panels with ethnic minorities, with over 120 people participating in focus groups to date. We also have a separate Young Carer Panel, with over 50 young carers participating in focus groups, and over 50 in a survey to date, to inform the new Young Carer Grant.

Reopening recruitment to Experience Panels

We will soon reopen recruitment for new panel members. While recruitment will be open to everyone with recent experience of the benefits being devolved, we will also target specific groups to

boost their membership. This will include ethnic minorities, young people and people in remote locations and islands.

We are also hiring researchers to help us reach a range of groups who are particularly marginalised, sensitive or dispersed.

Spotlight On: Our Interns' Work

In 2018 we brought two disabled interns through Inclusion Scotland's work placement scheme into the team to work on communication with panel members. They have, among other things, organised our first two events with panel members to feed back findings, written the first Experience Panels newsletter, and improved our website.

As well as bringing their own unique skills and experiences, the interns have increased the 'lived experience' of using social security within the team, and have been sharing their insights into working at the Scottish Government with panel members.

"I have really enjoyed working on the Experience Panels team. My adjustment needs are met and the work is really fulfilling, especially when I get the chance to talk with panel members."

"I especially enjoy the contact with the Panel members. Recently, at the end of an information session, a panel member told me he appreciated the honesty of the team, and that we have given her hope for the future. This means we are setting out to do what we aim to achieve- treating people with dignity, fairness and respect."

Feedback from panel members

In the Experience Panels team, we are always looking for opportunities to get feedback from panel members. In summer 2018 we asked panel members in a survey about what we are doing well and what we could do better.

We learned that panel members liked:

- feeling listened to,
- our flexibility in ways to participate,
- our easy to use surveys, and
- the format of events.

Suggestions for improvement included:

- more information and updates, and
- more flexibility in terms of how people can take part
 - more local events
 - wider range of timings of events,
 - using technology or offering home visits.

We will continue to run two 'tours' of Scotland a year to make sure people have an opportunity to meet us face to face wherever they live. We will offer as wide a range of timings for events as possible, and in line with demand. And we can now offer home visits for panel members who otherwise would not be able to take part.

Sharing what we have found

Now that we have completed a large amount of work and are regularly reporting, we have worked this year to share what panel members have told us with panel members, external stakeholder organisations and internal colleagues. This has included:

- Sending panel members the reports as they are published
- Beginning a newsletter for panel members (first edition being tested and finalised now)
- Starting a series of 'What you have told us and what's next' events for panel members
- Holding twice yearly events for stakeholder organisations
- Activity to share the work across everyone working on social security, not just those we work directly with.

Spotlight On: The Experience Panels Helpline

A key part of the Experience Panels programme is the work of the Experience Panels helpline. The helpline was set up to make sure panel members could contact us by phone to register, to ask questions and to take part in the research. These days the helpline staff are also involved in many other tasks. This includes managing the Experience Panels mailbox, typing up surveys that have been sent in by post and transcribing recorded interviews, among other things.

The helpline provide friendly help to any panel members who get in touch. Because of their experience and expertise, the helpline team were asked to take the first Carers Allowance Supplement calls while the Social Security Scotland headquarters were still being set up. This was a very important undertaking, as they were responsible for creating a positive impression of the newly-founded agency.

The team ended up dealing with nearly 600 calls and received praise from the Director of Social Security Scotland, David Wallace.

“My role as manager of EP Helpline is extremely rewarding. We are in a privileged and unique position to be able to help shape the future of Social Security Scotland, and the enthusiasm of the panel members is contagious. I try to empower the team to treat each caller the way they would like to be spoken to, and are encouraged to bring their own personality to each call. The team have a real pride and drive in what they do, which makes my job all the easier.”

What we have learned as a team

Our team of researchers, interns and admin support, as well as colleagues working with us from across the Scottish Government, have had a fantastic year working with panel members. We have

learned a huge amount from panel members' experiences, insights and ideas.

One area we've focused on a lot is always working to make our research as accessible as possible. This has included responding to views on the length and detail of our emails, to adapting the kinds of questions we use in surveys to be easy to use with screen readers, providing multiple kinds of milk wherever we go to make sure we are always meeting dietary requirements, and our never ending search for fully accessible venues across Scotland.

Finally, we have learned a lot from panel members themselves. We have been privileged to hear their stories, and are very grateful for the open, frank and thoughtful way they have shared their experiences and views with us.

Looking forward to 2019 and beyond

This section will look at our plans for next year, and longer term the plan for transferring social security research to Social Security Scotland.

2019

In 2019 we will continue our programme of work with panel members. We will continue work on specific benefits, including work on:

- Personal Independence Payment
- Child Disability Living Allowance
- Attendance Allowance
- Severe Disablement Allowance
- Cold Weather Payments
- Carers Allowance Supplement
- Funeral Expenses Assistance
- Best Start Grant
- Young Carers Grant
- Scottish Welfare Fund

We will also continue to cover a range of topics to do with how Social Security works across all benefits. In early 2019 we will run

an all panel set of surveys and focus groups around Scotland. We are in the process of finalising topics for these, but they are likely to include:

- Advocacy
- Processes for transferring DWP cases to Social Security Scotland
- Local delivery of Social Security Scotland services

As described above, we will reopen recruitment of panel members in early 2019 to refresh membership. We will also continue work with ethnic minorities, and begin a large programme of work with particular marginalised, sensitive and dispersed groups of people.

We will continue and expand our new series of events with panel members to share findings and give an update on Experience Panels and social security more generally. We will continue the new newsletter for panel members, and as always will share reports as they are published.

In 2019 we will also continue to keep stakeholder organisations up to date through events and advisory groups. And we will extend this work to include sharing our findings and approach with other parts of the Scottish Government and the wider public sector.

Beyond 2019

The Social Security Experience Panels is a Scottish Government programme of work and it will run until all the benefits being devolved have gone live. But that will not be the end of the Experience Panels approach.

Already Social Security Scotland have begun building a programme of research with their clients. Anyone contacting Social Security Scotland is given the chance to complete a short feedback survey on their experience. Social Security Scotland will use this feedback to improve the service they provide.

As the number of clients increases, Social Security Scotland will begin more research with clients. This will echo the Experience Panels approach. As each benefit is launched by Social Security Scotland, panel members who are then clients will be asked about their experience of moving to Social Security Scotland from DWP. They will also be offered the opportunity to stay involved in future research by Social Security Scotland.

When all benefits have been launched, the Experience Panels programme will wind down, but it will be replaced by Social Security Scotland's research.

We will work with panel members when we are deciding exactly what Social Security Scotland's research programme will look like, and how existing panel members will be involved alongside clients.

More information on this will be available early next year.

Conclusion

2018 has been a very exciting year for Experience Panels, as the research programme has become fully established and we are seeing panel members' input shaping a new system with dignity, fairness and respect at its heart. We would like to thank all panel members for their work this year, and look forward to continuing the work together next year.

How to access background or source data

The data collected for this social research publication:

- are available in more detail through Scottish Neighbourhood Statistics
- are available via an alternative route <specify or delete this text>
- may be made available on request, subject to consideration of legal and ethical factors. Please contact SocialSecurityExperience@gov.scot for further information.
- cannot be made available by Scottish Government for further analysis as Scottish Government is not the data controller.



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